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## **Make Win-Win a Reality: Delighting the Customer by Implementing Oracle HR - Integration Update to Fall 1997 Paper**

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### **Abstract**

Implementing Oracle Human Resources Management System (HRMS) using a customer and integration approach provides the organization an enormous opportunity to create a win-win situation for customers, the HR department and the enterprise. By soliciting input and feedback at the executive, middle management and employee levels and integrating closely with other Oracle application teams, the HR implementation team can match true enterprise needs to Oracle capabilities, creating positive expectations and delighting customers throughout implementation and upon delivery. This paper examines the customer and integration focused approach the Jet Propulsion Laboratory is using to implement Oracle HRMS and provides insight into mechanisms that foster involvement of various customer sets and integration across the Oracle applications.

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# Make Win-Win a Reality: Delighting the Customer by Implementing Oracle HR

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## Introduction

The Jet Propulsion Laboratory (JPL) Human Resources (HR) Oracle implementation provides insight into how Oracle Human Resources Management System (HRMS) can improve business processes. This paper examines the customer focus and integration approach the HR implementation team is utilizing to maximize the benefits of the Oracle applications suite and business process reengineering across the enterprise from the end customers to the HR department. From an enterprise perspective, the current business systems at JPL will be improved significantly by Oracle's integrated database and applications, accessible from Windows and all platforms via the Web. From the HR and other functional area perspectives, Oracle will provide immediate access to integrated data and make transactions more efficient. Finally, from the individual user viewpoint, Oracle will enable direct capabilities that will allow for self-service transactions and more rapid response.

### *What is delighting the customer?*

Delighting the customer means successfully meeting or exceeding user expectations for an accurate, reliable, and easy to use HR system that serves their needs in a timely manner. Accomplishment of this objective is contingent upon well-managed customer expectations. Managing customer expectations can be achieved by maximizing the customer's participation throughout all phases of process development and system implementation. The approach described in this paper focuses on involving the various customer groups in requirements definition, solution design and implementation, the goal of which is to identify the best utilization of Oracle's capabilities to realize a win for all stakeholders. In implementing an integrated package,

these stakeholders include the implementation teams for the other Oracle applications who look to HRMS set-up and data to meet their requirements.

## Background

### *Jet Propulsion Laboratory*

Managed for the National Aeronautics Space Administration (NASA) by the California Institute of Technology (Caltech), JPL is the lead United States center for robotic exploration of the solar system and employer to over 5,000 scientists, engineers, technicians and administrative staff. JPL spacecraft have visited all known planets except Pluto (a Pluto mission is currently under study for the late 1990's). In addition to its work for NASA, JPL conducts tasks for a variety of other federal agencies. JPL's latest achievement was the Mars Pathfinder Mission whose spacecraft landed on Mars on July 4, 1997 and gathered planetary data using rover technology.

### *New Business Solutions Program*

The motto of the New Business Solutions Program (NBS) at JPL is "Earth Services for Space People". The goal of NBS is to implement a new, on-line enterprise business solution which will enable JPL to achieve its strategic goals and objectives. Earlier JPL flight projects such as the Voyager mission to Jupiter, Saturn and Neptune have had lifecycles typically lasting three to five years. Now, JPL's smaller and more moderate missions are following the theme of "faster, better, cheaper", with shortened lifecycles of 18 to 24 months. At the same time mission cycles are shrinking, the number of mission launches are expected to increase substantially. To meet these evolving business needs, JPL's executive management determined that its business processes required a radical transformation and refocus onto leading business practices.

NBS will meet the changing business need of JPL through a twenty-three month simultaneous implementation of Oracle Human Resources, Finance and Acquisition applications. Created in December 1996, and planning an implementation date of September 1998, NBS will implement eight modules: HR/Payroll, Oracle Time Management (OTM), Project Accounting, General Ledger, Purchasing, Inventory, Payables and Assets. The eight phases of implementation are Selection, Current State Definition, Future State Visioning, Detailed Future State Design, Development, Conference Room Pilot Testing, Transition and Production. JPL consulting partners are Ernst & Young LLP and Oracle Corporation.

The objectives of NBS are to reengineer JPL business processes by incorporating leading business practices, implementing Oracle's commercial off-the-shelf business applications to support the new processes and providing change management to ensure a smooth implementation for all users and customers. Oracle will provide rapid and easy access to people, management information, products and services as well as significantly improve responsiveness to customer needs. More effective business processes and systems will directly result in higher quality and lower cost products.

### **A Customer-Focused and Integrated Approach**

The HR Project oriented their implementation strategy toward the customer, from the organization and focus of the teams to the determination of which capabilities within Oracle to utilize. The customer-focused approach departs from the traditional functional or process model by maintaining the perspective of the customer continuously throughout the entire lifecycle of the project. The integrative approach focuses on accommodating the needs of the other modules against HRMS and thus follows a process model approach. Merging the customer and process model approaches has enabled JPL to maximize enterprise-wide benefits across myriad customer groups. By treating the HR and other application user viewpoints as the focal point, this dual implementation approach observes processes from within the customer mindset outward --rather than examining processes from the primary vantage point of HR functional users and randomly soliciting customers for their viewpoint.

The customer and integration focused methodology is organized around specific customer groups: executives, middle-managers, employees and other Oracle application implementation teams. Each customer group is identified and analyzed to develop a better understanding of their needs and expectations. It is critical to invest the time required to understand the needs and viewpoint of the customer. Along with identifying customer needs, it is important to identify Oracle capabilities that meet or exceed user needs and involve customers in the entire implementation process from start to finish.

#### *Customer-Focused Teams*

To reinforce the importance of customers in the implementation, the HR Project, though organized around processes, is chartered to deliver products and services focused on customer type. Individual team members are charged with wearing the distinct "hats" of customer groups, characterized by service objectives, transaction time and use of information. Team members' expertise represent HR functional knowledge combined with the customer/user perspectives of one of four customer groups: Strategic Services, Partnership Services, Expertise Services, and Direct Services.

Strategic Services will consist of Human Resources experts focused on helping executive level management determine long-range plans three to ten years out. Partnership Services will have Human Resources experts who partner with various internal organizations in the mid-range planning of workforce requirements and other related issues. Expertise Services will provide supervisors with decision-making tools and information to support short-term solutions. Direct Services will focus on the individual employee, with some supervisory uses, aimed at the immediate administration of rules-based transactions/processing.

#### *Customer Involvement throughout Methodology Phases*

Customers can participate during all phases of implementation. By allowing the customer to contribute from beginning to end, they not only increase their knowledge and exposure to Oracle capabilities, but also help gather data and define future processes. Customer involvement is also a viable method of creating buy-in and user advocacy. Customers, including the implementation team members for the other modules, have collaborated with the HR Project during six specific phases to date: Selection, Current State Definition, Future State Visioning, Detailed Future State Design, Development and Conference Room Pilot Testing. The remaining

phases that will benefit from user participation are Transition and Production

JPL began by involving customers in the software selection process, which provided them an opportunity to see Oracle's capabilities to integrate information and provide immediate access and flexibility. This occurrence was a first in terms of the extent of customer input into the selection process. Many of the participants had never been included in this level of decision making nor were they ever asked about their opinion on how information technology could make their job easier. Given this early exposure to Oracle's capabilities, end users and stakeholders were able to begin visualizing significant improvements to current work processes.

The next level of involvement occurred during the analysis of the current state of HR processes, systems and performance. Each customer group (including the functional users) assisted the project in identifying the strengths and weaknesses of the processes to determine: what was working well, and therefore should be retained in the future; what needed improvement and thus should be avoided in the future; and what did not exist in the current state that was required for the future. These data points helped determine the implementation priority of HR processes and served as the baseline for other phases. At the end of the Current State phase, the module implementation teams met to identify enterprise-wide touch points or process threads that would serve as the integration process map for other phases.

To envision the future state of HR processes and systems, the HR Project invited customer groups to provide valuable feedback and assistance. Future State Visioning, in which end users lent their experiences toward visioning the HR of the future and resolving how to best utilize Oracle HRMS capabilities, built upon the work and customer feedback of the Current State Analysis phase. For example, weaknesses identified in the Current State phase were catalogued into the "Top Ten Things to Avoid in Future State Development" (see Exhibit 1). This top ten list was then used during the Future State Visioning sessions to remind customers of attributes and characteristics that should not reappear in the future. Another customer output from the Current State activity used to set the stage for visioning sessions was a list of "Significant Customer Requirements and Expectations" (see Exhibit 2). In addition to providing a baseline of expectations for Future State development, this list demonstrated the commonality of process and system requirements

across the executive, middle-management and employee customer groups. As a result, the different customer groups who participated in visioning sessions tended to coalesce quickly and have a better understanding of the overall direction toward which the Project was aiming. By capturing customer feedback, analyzing it and utilizing the output for ensuing sessions, the HR Project demonstrated to its customers that it had listened to them and visibly incorporated their words and ideas into the implementation plans.

### Top Ten Things to Avoid in Future State Development

- |  |   |
|--|---|
| 1 Non-value added steps or signatures            | 6 Manual process steps for anything rules-based |
| 2 Human Resources making decisions for employees | 7 Processes not connected to business needs     |
| 3 "Training-required" processes                  | 8 Over-protection of information                |
| 4 Redundant data bases                           | 9 Linear process steps                          |
| 5 Complicated rules                              | 10 One mode of access                           |

**Exhibit 1**

### Significant HR Customer Requirements and Expectations

- |   |  |
|---|--|
| • Easy, direct access   | • Flexible and empowering processes to meet changing needs |
| • Automated search capability of integrated databases               | • One-stop shopping for all HR-related help and services   |
| • Integration of processes and databases to easily do reporting     | • Confidentiality and security of data                     |
| • Aligned processes to strategic goals or systems                   | • Range of help available e.g., FAQ's and templates        |
| • Shortened cycle time through streamlined and simplified processes | • Clarity of roles and rules and consistency of responses  |

**Exhibit 2**

Customer involvement during Future State was not limited to the groups that physically attended the discussions. Employees that participated in the visioning sessions were given an opportunity to test their innovative models real-time. The participants used a validation method called field testing to determine the soundness and viability of their initial concepts. After creating a vision of future process that incorporated Oracle capabilities, the group divided into pairs and made appointments with process users at the executive,

middle management and employee levels. During these appointments, the teams explained their concepts and asked for feedback on strengths and weaknesses. The HR Project received favorable responses from the customer groups that were interviewed on their opinions as well as from the teams that validated the concepts from the visioning sessions. The field testing method produced a pleasant departure from the traditional techniques normally used to validate concepts. Field testing also allowed the participants to refine their designs based on the fresh perspectives provided by other customers through field testing.

To foster integration with the other modules, the designs used in field testing were shared across the implementation teams. The teams mapped the icon flows depicting the future state visions into enterprise process threads based on the touch points identified in the Current State phase. This exercise served to identify and resolve areas of conflict between the modules and gaps in the vision based on requirements from the other modules.

The Future State Design phase refined the high-level visions down to a detailed process level. Given the shared table format within the Oracle applications suite, this phase required an even greater focus on integration across the implementation teams. Specifically, it was critical to agree upon an HRMS set-up that would meet the functionality needs of all modules. A Decision Focused Session (DFS) was held to educate stakeholders on Oracle HRMS set-up. Stakeholders included HR functional users, line managers and implementation team members representing the other Oracle modules, including Purchasing, Inventory, Projects, General Ledger, Assets, Payroll and Timekeeping. The set-up areas treated in the DFS are shown in Exhibit 3.

Decision Focused Session Topics	
• Locations	• Person type
• Organizations	• Employment category
• Jobs	• People groups
• Positions	• Data access
• Employee assignments	• Security

**Exhibit 3**

Location is an example of a set-up topic which touches multiple modules. For example, Payroll uses location to house payroll sites; Purchasing uses it for deliver to, ship to and bill to addresses; and HR uses it for employee work locations.

In parallel to the DFS, “tiger teams” were working to develop detailed process designs. Tiger teams were made up of the implementation teams of the highly integrated HR/Payroll and Timekeeping modules and the developers supporting those teams. They met to develop comprehensive solution designs to meet integrated requirements. This solution design, including a combination of manual, set-up and customized solutions, was documented into detailed functional designs from which developers could create technical designs and functional team members could write test scripts for the Conference Room Pilots (CRP) phase.

The CRP phase is another critical stage to involve customers and integrate across modules. The purpose of CRP is to increase user awareness of the system, validate processes, test the system and build customer acceptance. Users were instructed in basic Oracle navigation techniques, enabling them to sit at the keyboard and walk through the script step by step. Because the Oracle screens were configured to meet JPL requirements and populated with JPL data, users were able to better validate process designs and evaluate test results. Their participation also increased user buy-in to the new system and processes. From an integration viewpoint, linking scripts together to form enterprise process threads validated shared solutions. For example, funding an account, entering a purchase order (based on the position hierarchy set-up in HRMS), receiving the order, paying the invoice and posting the payment to the general ledger is a process thread that crosses several functional areas within the enterprise. When the customers viewed the HR processes as discrete entities, as well as part of an entire thread across functional areas, it broadened their perspective and significantly increased their regard for the complexity of the implementation effort.

*Participation in Oracle Special Interest Groups*  
Encouraging customers to join the implementation team in attending Global HRIS Special Interest Group (SIG) meetings can create positive regard toward Oracle as well as have an impact on Oracle’s HR enhancements. The Global HRIS SIG held its first meeting at the 1996 Fall OAUG conference. At that meeting, JPL’s HR Project volunteered to host the inaugural meeting in Los Angeles. Hosting a SIG meeting at the home office afforded JPL customers and stakeholders a chance to

interface and network with SIG members. Therefore, customers who would never have attended an Oracle conference or been exposed to external perspectives on implementation, benefited from talking to over 50 SIG members that attended the meeting. Instead of having to fund travel and convincing stakeholders to attend, the HR Project brought the Oracle users to JPL customers, creating an opportunity to increase customer awareness of Oracle products, capabilities and upcoming releases and participate in product development.

## Delighting the Customer

After using a customer and integration focused approach for the Oracle HRMS implementation and business process reengineering, readers may wonder what our results are thus far. How can one successfully engage customers and satisfy them to the point of delight? As one can imagine, where one or more gather to discuss any topic, the possibility of dissension enters into the picture. The key to customer satisfaction and maintaining alignment across modules lies in successfully managing expectations along the path toward implementation. Our approach to date has been fairly successful based on follow-on attendance to sessions and feedback from customers after meetings.

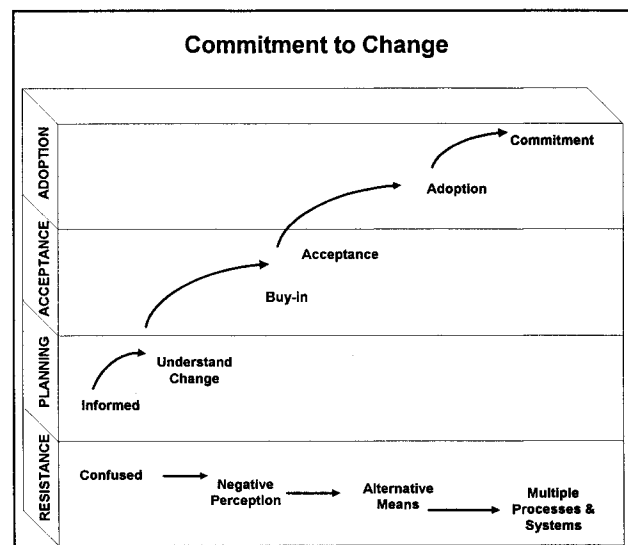
Management of customer expectations is derived from clear, direct and consistent communication. Management of customer expectations results from using plain English and up-front interactions that seek to mitigate resistance to change by outlining the business reasons driving change and anticipated benefits from the customer's perspective. Successful management of customer expectations requires trust and time dedicated to answering questions and not only hearing what the customer has said, but also demonstrating that you heard by responding in an intelligible and satisfactory (to them) manner. Clearly, customer delight lies in the eyes of the beholder, but as the implementation team, you can take certain precautions and adhere to specific customer interface standards to ensure the highest level of satisfaction.

The HR Project has informally noticed themes of customer opinion and behavior that follow a curve demonstrating customer commitment to change (see Exhibit 4). These themes were gathered at debriefing sessions for HR Project members. The debriefings were used to discuss customer participation, behavior and opinions at implementation meetings. Generally, during their first interactions with Oracle and the HR Team, customers showed signs of resistance, negativity and

non-support of change. As their level and frequency of participation increased, more customers showed signs of buy-in and acceptance, even voicing their positive perceptions toward the future state. For example, HR customer acceptance grew as they interacted with functional users outside HR and experienced a more fully integrated view of the Oracle application suite. As the implementation transitions to production, the HR Project anticipates that the majority of the customers will continue following the curve upward by exhibiting acceptance toward the new HR processes and systems. Finally, customer delight will be realized as the majority of customers adopt and commit to the innovative systems and processes they helped to create.

## Making Win-Win a Reality

Realizing a win-win on various customer levels is a feasible outcome based on the HR Project's customer and integration focused approach and the level of customer participation in documenting the Current State, defining the Future State Vision and developing and testing the detail of future HR systems and processes. We predict that the customer, the HR Department as well as the enterprise will perceive value and benefit from implementing Oracle HRMS.



**Exhibit 4**

A win for customers is being demonstrated by the trend of their acceptance of and participation in the new HR systems and processes. Customers have not only accepted requests to provide input, but afterward also ask when the next opportunity for input will occur. That is a dramatic departure from the initial interfaces

and an example of the level of positive reinforcement for the implementation strategy.

A win for the HR department is being achieved through eliminating non-value added activities and transforming HR activities from clerical processing to a service-orientation; from policing to consulting; from being perceived as an obstacle to being perceived as a partner in getting the job done right and on time. These changes truly position the HR department precisely where they want to be in the organization: a significant and important contributor toward the accomplishment of the JPL missions.

After securing a perception of value from the customer groups, such as the line and functional users of both HRMS and other modules which share HR tables, a win at the enterprise level is inevitable. JPL can accomplish its initial goals for forming the New Business Solutions Program, to meet the business needs of the Laboratory by enabling smaller missions through providing higher quality business processes, reliable systems at lower costs, and supporting more effective and integrated technology.

## **Conclusion**

In conclusion, to succeed in realizing a win-win outcome at the completion of implementing Oracle HR, a customer and integration focused approach is a viable solution to aligning and managing customer expectations as well as meeting and exceeding functional end user and enterprise-wide business needs and requirements.

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## **About the Authors**

Jeanette K. Mills is a Team Co-Lead for Partnership Services and a member of the HR Project Core Team for JPL's Oracle HRMS implementation. Prior to working on the New Business Solutions Program, she was a member of a Reengineering Team focused on the Growth and Assignment of People at JPL. In addition, Jeanette has nine years of experience as a Senior Contract Negotiator in the Acquisition Division at JPL, where she supports various flight projects and enterprise-wide initiatives.

Shawn M. Shope, a manager with Ernst & Young LLP Management Consulting in Los Angeles, is currently helping to manage JPL's Oracle HRMS implementation. Shawn specializes in transforming support processes in the aerospace/defense, entertainment, health care and public sector industries. She has over eight years of human resources experience and is certified as a Senior Professional in Human Resource Management.

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